Undertaking a formal Leadership Programme: The Librarian's Experience

Helen Fallon, Deputy Librarian,

Hugh Murphy, Collections Management Services,

Maynooth University

Abstract

Two librarians from Maynooth University completed the UK Future Leaders Programme (FLP), offered by the Leadership Foundation for Higher Education. In this case study they describe the structure and content of the programme, assess the learning methodologies, tools and techniques used and discuss how the programme has impacted on their practice and their identity as leaders. Throughout the article the librarians are referred to as Librarian A (Helen Fallon) and Librarian B(Hugh Murphy).

Keywords: Leadership, reflection, impact on practice.

Introduction

The Future Leaders Programme (FLP) was developed in 2006 by the UK Leadership Foundation, to help develop visionary library leaders. At the time of undertaking the course - 2010 (Librarian A), and 2011 (Librarian B) - the programme was aimed at librarians and ICT staff in senior management positions, in the higher education sector in Ireland and the U.K. More recently the programme has been extended to include senior administrative staff.

The programme runs over one year, with a series of three-day residential modules in February, July and November and a final Capstone day in March of the following year.

Application process

The application process involves the completion of a standard application form, a 500 word personal statement outlining why the applicant wishes to undertake the programme, a Capstone project proposal and a telephone interview. The Capstone project involves carrying out a workplace change management project. Librarian A selected a proposal around designing a more structured approach to library staff development, based on the identification of key competencies. Librarian B proposed a project on devising a digitisation framework for the University Library. Both of the projects were areas they had some familiarity with and were likely to be able to see to fruition. However, it is not a requirement that the proposed change project be completed within the time scale; rather the focus is on the processes and the knowledge and skills gained during the period.

Module 1 - Focus on the self

A central aspect of the FLP is that each individual achieves a greater understanding of their own self; their fundamental values, their outlook and the criteria they use to assess both themselves and others. As with much of the programme, this is influenced by the work of

Torbert (2004) on Action Inquiry (learning through questioning), where understanding one's motivations is central to acting in harmony with them.

In Module 1, the individual is pushed to examine and articulate their ideals and consider their motivations. This is undertaken through discourse in the larger group, and also via several exercises. An important part of module 1 is the completion of two surveys - the Margerison-McCann Team Management Profile and the Windows on Work Values tool. Through completing these surveys and subsequent discussion of the results, with an assigned mentor - from the team of three leading the course - a supportive atmosphere is created. Participants can explore their leadership style, vision, values and leadership behaviours on a one-to-one basis.

Through this and other exercises, reading and discussion, the individual engages in a deep level of reflection and gains a deep understanding of their strengths and weaknesses, values espoused and (critically) how these individual traits can be used to coalesce into a larger team. While challenging and somewhat unsettling, this work proved to be incredibly useful and unexpectedly empowering, highlighting areas of strength and weakness while allowing validation for one's personal perspective.

The focus is then shifted from the individual, to the broader group. This helps the individual understand that others may work in a different manner, interpret information differently and have alternative sets of values. By understanding one's self, it becomes possible to identify certain characteristics in others and this can be particularly helpful when working with teams. The validation of the individual's characteristics becomes extended to the idea of the team; bringing with it the understanding that other's values are equally valid. This lays the foundation for the next module, focussing on team building and relationships.

Module 2 - Focus on the team

Module 2 moves the focus away from the self, to that of the team. As with all modules, some work is done before attending the three-day session – from the general (consideration of the characteristics of good teams) to the more focussed (creation and use of a questionnaire among one's local teams and acting on the feedback).

Inevitably, focussing on the idea of 'team' requires some focus on the 'self' and in this regard module 2 links to, and builds upon the work in module 1. Preparatory work includes the completion of two 360-degree feedback exercises. Each participant completes a survey of their leadership practice and style and asks five colleagues to anonymously complete the survey. The final results are explored initially with the assigned mentor. This tool is well known and typically its efficacy will rely on how much participation others feel is appropriate and their honesty in feedback. For it to work there has to be a breadth of honest feedback which the subject has to take as constructively as possible. In order for the participant to get a comprehensive view of both themselves and how others view them, it is critical to view these findings in conjunction with the other assessment exercises undertaken. Needless to say, there should be some correlation in the findings.

Preparatory work for Module 2 included completing the Honey and Mumford Learning Style Tool.This is based on a questionnaire available at

 http://www.ejtn.eu/PageFiles/6343/Learning_Styles_Questionnaire.pdf

There are four learning styles – activist, reflector, theorist and pragmatist. Librarian A found her style was pragmatist. Pragmatists are keen to try out new ideas, theories and techniques to see if they work in practice. Her lowest score was as theorist. This made her realise that she needs to develop more in this area, using statistics and evidence more as the basis of decisions. She also concluded she would benefit from integrating more of the practices of the reflector – standing back to ponder experiences and observing them from many different perspectives.

Preparatory work for module 2, also included interviewing an inspirational leader. Librarian A
 selected Mary O'Rourke, a former minister for education, She wrote a reflection on the
process in her reflective journal.

> *When I asked Mary about the values she lives by, she responded that she valued
> herself. It was a bit startling to have someone say this so directly. I realise that I came
> through an education system that put some emphasis on modesty and not putting
> yourself forward. Next to valuing herself she values people and partic*ularly *those with
> different and challenging viewpoints…She sees leadership as a gradual evolving
> state…She values the advice she got from an older man who told her she couldn't
> champion everything without wearing herself out. This was something I noted from
> other participants' experiences of interviewing leaders; most displayed a healthy self
> confidence.*

Librarian B selected the incoming President of Maynooth University. One of the more pertinent
points which he came away with the importance of morality in a position of responsibility and
the concomitant responsibility which moral authority brings.

Module 3 − Focus on the organisation

The third module focuses on organisational strategy. Preparatory work included working in a
team on a PESTLE (political, economic, sociological, technological, legal, environment)
analysis and each participant doing a SWOT (strengths, weaknesses, opportunities and
threats) analysis for their workplace. Participants consider their Library in the context of the
University, as well as national and international developments. From this, the value of aligning
strategy with university and broader contexts, while becoming more aware of the external
factors which shape the environment they work in becomes evident. This in turn prompts
participants to become more outward-looking as leaders.

Action Learning Sets and peer coaching triads

Early in the overall process, the FLP cohort is diveded into three Action Learning Sets (ALS), comprising six to seven members. The ALS works in parallel with the overall programme, having three one day meetings which allow the group to apply the learning to their own specific contexts. The Action Learning Set is 'inaugurated' with a dinner, where each member shows and discusses personal symbols of leadership. As a very personal display, quite early into a gruelling programme, it serves to create strong ties of trust and honesty which are retained throughout the programme and beyond. The Action Learning Set will inevitably have a variety of personalities and serves to be a deeply enlightening experience, offering both support and the diverse wisdom of a group of very different people. By listening to others share their experiences, parallels become very apparent. The work of the Action Learning Set draws on a variety of methodologies, including appreciative inquiry, and using open questioning to help each individual interpret their concerns in new ways. The Action Learning Set is probably the most 'open' forum on the Programme and its success is founded on the privilege of trust.

Peer Coaching triads were also established at an early stage. These triads aim to offer a more flexible, responsive support to individual's issues, typically taking place over the phone. Both Librarians found the Peer Coaching triad to be less effective than the ALS and this seemed to be the case across cohorts. It may be that part of the reason for this is that individuals have to publicly approach others and invite them to join, which can bring with it a degree of awkwardness.

Project and Capstone day

The importance of the proposed project being completed is debatable as much of the benefits of the Future Leader's Programme would suggest that 'the journey is the destination'. Librarian A's project became subsumed into the Library's Strategic Plan. Librarian B's project evolved over the course of the programme and its formal completion became less important as time went on. In both cases most of the learning resulted from the 'process' of the project rather than the 'results'.

The formal aspects of the Programme end with a 'Capstone Day' which endeavours to tie together the various aspects of the learning journey undertaken. This is done primarily via individual Action Learning Set with discussion and presentation of individual reports. Finally each ALS makes a presentation to the group as a whole. While there is a positive, valedictory sense to the day, the sheer diversity of proceedings served to diffuse some of the potential benefits. For example, while the presentation of reports stimulated useful debate and inquiry, the learning from the larger, more theatrical presentations felt more limited to that of one's own Learning Set. Probably the most important accomplishment of the day is the sense of achievement and completion and the understanding that the lessons learned should hopefully endure and the methods of analysis, inquiry and learning should and must continue.

Readings

There are three core texts for the programme: In "Action Inquiry: the Secret of Timely and Transforming Leadership," Torbert (2004) explores how leaders and organisations can develop the capacity to continually learn and transform themselves. Both Librarians found Torbert's model - Framing, Advocating, Illustrating and Inquiry - useful to use when preparing for potentially difficult meetings. Framing involves setting the context, so that all those around the table know why a particular change/development is being suggested. Advocating involves making the case. Illustrating is showing what the organisation might look like after the change and inquiry involves ensuring people understand what is being suggested and giving them space to ask questions and articulate concerns. Action learning involves learning through doing with open questions being central to the process. Both readings and discussion on the course, emphasise the concept of raising the quality of the conversation, positing that the nature of the question determines the quality of the conversation. Torbert suggests implementing change using the following framework:

- Intention - Am I doing the right thing?
- Plan - What is my strategy?

- Action - What behaviour will I adopt?

- Results - what results do I want?

Quinn (1996) - another core book - takes a different approach. "Deep Change: Discovering the Leader Within" might be described as a self-help book on how leaders can effect change in organisations by changing themselves. Each chapter is followed by a set of questions, that can be used to explore personal and organisational change. The book also covers issues such as change, control, integrity and personal vision as well as different models of leadership.

The third core text "The Leadership Challenge" by Kouzes and Posner (2002) explores key behaviours of successful leaders. It emphasises value-driven leadership and reflection, posing questions such as:

- What are you passionate about?

- What are your work values?

- What are your personal values?

- How do you manifest your values?

The authors suggest key behaviours of successful leaders include:

- Challenging the process
- Inspiring a shared vision
- Enabling other to act
- Modelling the way
- Encouraging the heart

A number of other leadership texts were suggested and each participant was required to review one of the titles. The book reviews were then added to the Virtual Learning Environment (VLE), which is available to course participants during the course and for an additional year. This allowed each person to get a flavor of the readings. Two interesting factors were the

strong bias towards US publications on the reading list and the absence of any leadership title which related to leading libraries.

Reflective journal

It was recommended that participants complete a reflective journal during the year. Librarian A kept a hand-written journal based on guidelines available at http://infed.org/mobi/writing-and-keeping-journals-a-guide-for-educators-and-social-practitioners/

Reflective Journal Questions

- As I look back on the day what was the most significant event?
- In what way was this way unique, different from other days?
- Did I have any particularly meaningful conversations?
- Did I do any reading? What were my reactions to it?
- How did I feel during the day? What were the emotional highs and lows? Why did I feel as I did?
- Did I find myself worrying about anything today?
- Did I fail at anything today? What can I learn from this?
- What were the chief joys of the day?
- What did I accomplish?
- Did I fail at anything? What can I learn from this?
- What did I learn today? When did I feel most alive?

She wrote the journal approximately five evenings per week and the exercise took about forty five minutes. She found answering the reflective journal questions quite illuminating and became more aware of her behaviours and feelings as a leader. She had quite a lot of meaningful conversations, but had to balance between a leadership style that emphasises communication and the ability to get things done. Spending so much time communicating both formally and informally with people, made the day fragmented on occasions and there was a

sense of having achieved little at the end of the day.

Librarian A also used her journal to record her responses posed in questions in the readings such as Kouzes and Posner's "How do you manifest your work values?" Other ideas and insights were also included in the journal.

> *From keeping the journal I realise I need to think and plan more before acting. My natural inclination is to act. It's very time consuming to plan things out, for example before a meeting, but I realise this is time well spent rather than an indulgence. I also realise I need to stand back more and ask questions. I've used the open questions such as "What does a solution to this problem look like?" on occasion. I'm getting better at passing things back to people i.e. suggesting ways they might deal with issues/tasks, rather than taking them on. I also realise I need to take proper breaks – coffee/lunch etc. I feel a growing sense of my own identity as a leader. I need to think more about getting the balance between being inclusive and being a leader and getting things done.* Extract from Reflective Journal

Librarian B also kept a reflective journal, albeit its use was more driven by issues that arose day to day (as opposed to rigorously maintaining it). He found that by taking the time at the end of a working day to note feelings and thoughts (in a semi-structured way) a range of alternative viewpoints became clear.

Reflection

One of the interesting benefits of participation on a programme which includes both Ireland and the UK is that, despite the similarities in roles and profession the cultural difference between different institutions, regions and countries becomes quickly evident. This provides an interesting contrast in the context in which leadership is considered and it is imperative to bear these differences in mind, when discussing with colleagues as to how best to resolve issue. Ultimately it reinforces one of the central tenets of the FLP course - that people are different and one's leadership, while driven by personal values, has to be framed by the environment in which we operate.

Both participants found the 'zone' concept, outlined on the course to be a very useful tool in which to understand different feelings relating to work, at different times.   The zone concept identifies three zones – the comfort zone, the learning zone and the "Oh Hell!" zone.   Both Librarians recognised that boredom set in when spending long periods on routine, easy tasks (comfort zone); they enjoy the stimulation of learning new things (the learning zone) and like other course participants, found applying new learning very challenging on occasions (the "Oh hell!" zone).   In addition to help them understand their own behaviour and emotion around tasks, the zone concept helped them better understand work practices of colleagues; for example there can be very high levels of enthusiasm after a course or workshop, but participants can sometimes, after an initial burst of activity, conclude "It wouldn't work here," because it is very uncomfortable/difficult to execute the change (the "Oh hell!" zone).   Too much time in the "Oh hell!" zone can result in serious stress, paradoxically, however this is where the deepest learning happens. Too much time in the comfort zone – carrying out the same tasks repeatedly results in little learning and boredom. Both librarians recognised their need to have a variety of significant projects over a period, alongside routine tasks.

While all the tools used for analysis and reflection were useful, both Librarians found the Margerison-McCann Team Management Profile to be particularly valuable in understanding their leadership style. Interestingly, both had almost identical profiles and this awareness has served them well in acting on the same Library Senior Management Team.

Although the course finishes after a twelve month period, it is essential to understand that the learning continues and both Librarians have worked to ensure that their practice is informed by many of the lessons learned. Librarian A continues to keep a reflective journal from time to time, while Librarian B still meets with his Action Learning Set at least annually. Both realise that Leadership is a journey and we continue to learn through both the theory and practice of leading.

References

Kouzes, James M., and Barry Z. Posner. The Leadership Challenge. San Francisco, CA: Jossey-Bass, 2007.

Quinn, Robert E., and Inc ebrary. Deep Change: Discovering the Leader within. San Francisco, Calif: Jossey-Bass Publishers, 1996.

Torbert, William R., and Susanne R. Cook-Greuter. Action Inquiry: The Secret of Timely and Transforming Leadership. San Francisco, CA: Berrett-Koehler, 2004.